

The K-12 online learning market landscape

Paralleling the growth of K-12 online learning has been the growth in private providers and products serving online and blended programs and courses. All online programs use one or more private suppliers to provide the content, software, or hardware upon which the online school is based. The extent to which components of the online school are developed in-house versus being outsourced varies widely. The growth of these providers, and the ways in which they have expanded into new and often overlapping areas, has created confusion for many educators and policymakers.

Figure 8 attempts to alleviate some confusion by presenting a graphical depiction of the K-12 online learning market landscape. The graphic is meant to give the reader an idea of providers in three areas: Delivery and Management Systems; Content and Instruction; and Professional Development. Delivery and Management Systems encompasses several areas: Learning Management Systems, Student Information Systems, Web Conferencing, and Other Tech. Content and Instruction includes some companies that provide content without teaching, and others that provide both. In the bottom right, Education Management Organizations are included; these companies provide many of the services around the entire wheel, though some online programs may choose to contract out only one or two of their services.

The diagram shows representative companies, and does not attempt to depict a complete list of providers in each area. It is a snapshot, as of fall 2010, of a rapidly changing landscape.

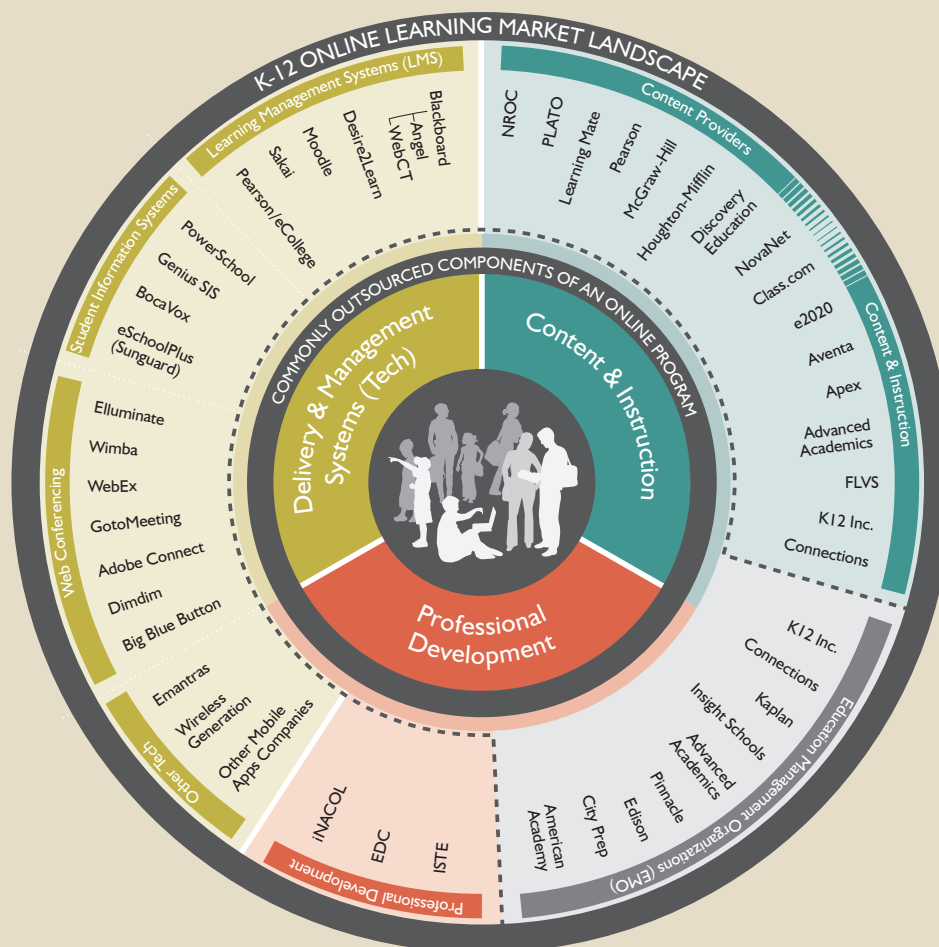


Figure 8: The K-12 online learning market landscape